

Electronic Benefit Transfer (EBT) Project



Request for Proposal for EBT Services

Section 8, Proposal Format

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***RFP-OSI-0530-204
Addendum #1***

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Table of Contents

8	Proposal Format.....	1
8.1	Draft Proposal Submission and Format Requirements	1
8.1.1	Number of Copies	1
8.1.2	Draft Proposal Packaging and Labeling.....	1
8.1.3	Draft Proposal Delivery	1
8.1.4	Draft Proposal Format.....	1
8.2	Final Proposal Submission Requirements	2
8.2.1	General Submission Requirements	2
8.2.2	Master Copy	2
8.2.3	Number of Copies	2
8.2.4	Final Proposal Packaging and Labeling.....	3
8.2.5	Final Proposal Delivery	3
8.3	General Format Guidelines	3
8.3.1	Page Limits	4
8.4	Bidder's Technical Proposal Format	4
8.4.1	Cover Letter	5
8.4.2	Table of Contents	5
8.4.3	Chapter 1, Executive Summary	5
8.4.4	Chapter 2, Response to Administrative Requirements	5
8.4.5	Chapter 3, Response to California Preference Programs	5
8.4.6	Chapter 4, Past and Current Performance.....	6
8.4.7	Chapter 5, Letter of Credit	6
8.4.8	Chapter 6, Project Staffing.....	6
8.4.9	Chapter 7, Approach to Project Management.....	6

8.4.10	Chapter 8, Response to Business and Technical Requirements	6
8.5	Bidder's Cost Proposal Format	7
8.6	Contract	8
8.7	Bidder's Supporting Documentation.....	8

8 Proposal Format

Instructions in this section prescribe the mandatory proposal format. Format instructions must be followed, all requirements and questions in the RFP must be answered, and all requested information must be supplied.

8.1 Draft Proposal Submission and Format Requirements

Submission of a draft proposal is optional. However, bidders are strongly encouraged to submit draft proposals that are as complete as possible so the state can provide feedback on those requirement responses which are nonresponsive to the requirement, are otherwise defective, or for which additional clarification is required.

The draft proposal contains only the technical proposal and the contract. **The bidder shall not submit a cost proposal with its draft proposal.** Any supporting documentation is optional.

If the bidder does not intend to submit a draft proposal, the state requests, but does not mandate, that the bidder provide a letter on the date draft proposals are due indicating that it has elected not to submit a draft proposal. The letter should be sent to the Procurement Official listed in Section 1.9, Procurement Official.

8.1.1 Number of Copies

The bidder must provide 12 printed copies of the draft technical proposal and five (5) copies of the contract.

8.1.2 Draft Proposal Packaging and Labeling

The bidder's draft proposal must be completely sealed and marked with the following:

EBT RFP OSI 0530-204 – DRAFT BID – TECHNICAL PROPOSAL AND CONTRACT

All boxes or envelopes must include the bidder's name and return address.

8.1.3 Draft Proposal Delivery

The draft technical proposal, as well as any supporting documentation the bidder chooses to include, must be delivered no later than the time and date specified in Section 1.10, Key Action Dates. The proposal must be mailed or delivered to the Procurement Official listed in Section 1.9, Procurement Official.

8.1.4 Draft Proposal Format

The bidder's draft technical proposal should follow the format requirements as specified in Sections 8.3, General Format Guidelines, 8.4, Bidder's Technical Proposal Format, and 8.6, Contract. Utilizing this format will help the state to assess if the bidder is submitting a compliant response.

8.2 Final Proposal Submission Requirements

8.2.1 General Submission Requirements

The bidder must submit its final proposal in four (4) separate binders or sets of binders:

- Technical Proposal
- Cost Proposal
- Contract
- Supporting Documentation (optional)

8.2.2 Master Copy

The bidder must provide one (1) printed master copy of its technical proposal, cost proposal, contract, and any supporting documentation, clearly labeled “Master.” The master copy must include original signatures on any included cover letters, forms, and exhibits.

The master technical proposal must include a Compact Disc (CD) containing only the contents of the technical proposal in a format that is readable using Microsoft Office 2003.

The master cost proposal **must be separately sealed** and must include a separate CD containing only the contents of the cost proposal in a format that is readable using Microsoft Office 2003.

In the event there are any discrepancies between two (2) copies of the same document or between a printed copy and the CD content, the printed master copy will be used as the authoritative version.

8.2.3 Number of Copies

In addition to the master technical proposal, master cost proposal, and master contract, the bidder must provide the following number of copies:

- Technical Proposal – 11 printed copies
- Cost Proposal – 5 printed copies
- Contract – 5 printed copies
- Supporting Documentation (optional) – 5 printed copies

8.2.4 Final Proposal Packaging and Labeling

The bidder's final proposal must be completely sealed and marked with the following:

- Technical Proposal – One (1) copy must be clearly marked “Master.” The box or envelope containing the one (1) master, 11 copies, and CD of the technical proposal must be marked “EBT RFP OSI 0530-204 – FINAL BID – TECHNICAL PROPOSAL.”
- Cost Proposal – One (1) copy must be clearly marked “Master.” The separately sealed box or envelope containing the one (1) master, five (5) copies, and CD of the cost proposal must be marked “EBT RFP OSI 0530-204 – FINAL BID – COST PROPOSAL.”
- Contract – One (1) copy must be clearly marked “Master.” The separately sealed box or envelope containing the one (1) master and five (5) copies of the contract must be marked “EBT RFP OSI 0530-204 – FINAL BID – CONTRACT.”
- Supporting Documentation – If submitted, one (1) copy must be clearly marked “Master.” Supporting documentation may be included in the same box as the technical proposal. If it is packaged separately, the box or envelope containing one (1) master and five (5) copies of the supporting documentation must be marked “EBT RFP OSI 0530-204 – FINAL BID – SUPPORTING DOCUMENTATION.”

The cost proposal must be sealed and submitted separately from the technical proposal, contract, and supporting documentation.

All boxes or envelopes must include the bidder's name and return address.

8.2.5 Final Proposal Delivery

The technical and cost proposals, contract, as well as any supporting documentation, must be received no later than the time and date specified in Section 1.10, Key Action Dates. The proposal must be mailed or delivered to the Procurement Official listed in Section 1.9, Procurement Official.

8.3 General Format Guidelines

The following general format guidelines apply to both the technical and cost proposals:

1. The following should be shown on each page of the proposal:
 - Proposal for EBT services (RFP OSI-0530-204)
 - Bidder's name
 - Page number
2. Page numbering should be done by proposal chapter and include reference to the total number of pages for that chapter (e.g., Chapter 1, Page 1 of 10).

3. The state prefers the use of 12 point Arial for all text and between 10 point Arial and 12 point Arial for information presented in tables.
4. The font size should be eight (8) point or larger for all figures and exhibits.
5. The text should be single spaced and left justified.
6. Margins should be one (1) inch on the top, bottom, left, and right.
7. The proposal should be printed using single-sided pages.
8. Pages, other than foldouts, should not exceed 8.5 inches by 11 inches.
9. Foldouts should be limited to a size no larger than 11 inches by 17 inches.

8.3.1 Page Limits

The executive summary in the technical proposal has recommended length of ten (10) pages. To ensure bidders stay within page limits:

- A single-sided page counts as one (1) page.
- A single-sided foldout will be counted as two (2) pages.

Although no chapters of the bidder's proposal are page limited, each bidder is strongly encouraged to submit a proposal with content directly related to describing how it will meet the requirements contained within the RFP. Marketing material and other information the bidder deems of value can be placed in the supporting documentation binder.

8.4 Bidder's Technical Proposal Format

This section specifies the format for the bidder's technical proposal. This format must be adhered to. Failure to follow the format may result in disqualification.

The bidder's technical proposal must be presented based on the following outline:

Cover Letter

Table of Contents

Chapter 1 – Executive Summary

Chapter 2 – Response to Administrative Requirements

Chapter 3 – Response to State of California Preference Programs

Chapter 4 – Past and Current Performance

Chapter 5 – Letter of Credit

Chapter 6 – Project Staffing

Chapter 7 – Approach to Project Management

Chapter 8 – Response to Business and Technical Requirements

The bidder must ensure that no cost information of any type is included in its technical proposal. The inclusion of cost in any fashion or format in any place other than the cost proposal will result in the rejection of the proposal.

8.4.1 Cover Letter

The cover letter must be in accordance with the requirements presented in Section 5.3, Cover Letter and Executive Summary.

Cost information must not be included in the cover letter.

8.4.2 Table of Contents

The table of contents must identify the major parts of the proposal, by page number. The table of contents should be taken to the third outline or heading level. All tables, exhibits, and forms must be listed in the table of contents.

8.4.3 Chapter 1, Executive Summary

This chapter of the bidder's proposal must contain an executive summary in accordance with the requirements presented in Section 5.3, Cover Letter and Executive Summary.

The recommended length of the executive summary is ten (10) pages.

Cost information must not be included in the executive summary.

8.4.4 Chapter 2, Response to Administrative Requirements

This chapter of the bidder's proposal must address the requirements presented in Section 5.1, Administrative Requirements.

8.4.5 Chapter 3, Response to California Preference Programs

This chapter of the bidder's proposal must address the bidder's participation in preference and incentive programs as presented in Section 5.2, State of California Preference and Incentive Programs. The bidder is not required to participate in the preference programs described; however, if not participating, the bidder must declare it is not seeking participation in the preference program as presented in the requirements in Section 5.2, State of California Preference and Incentive Programs. The bidder's response must address each preference and incentive program in the following order:

- Target Area Contract Preference Act
- Enterprise Zone Act
- Local Area Military Base Recovery Act Preference
- Small Business Program
- Disabled Veteran Business Enterprise Participation Program

8.4.6 Chapter 4, Past and Current Performance

This chapter of the bidder's proposal must address the requirements for bidder's qualifications as presented in Section 5.4, Bidder Past and Current Performance. The bidder's response must follow the order of the requirements in Section 5.4, Bidder Past and Current Performance and specifically reference each requirement. Required forms and submittals must be included at the end of Chapter 4.

8.4.7 Chapter 5, Letter of Credit

This chapter of the bidder's proposal must address the requirements for the bidder to provide a letter of credit as presented in Section 5.5, Letter of Credit.

8.4.8 Chapter 6, Project Staffing

This chapter of the bidder's proposal must address the requirements for project staffing as presented in Section 5.6, Project Staffing, the key staff requirements found in Section 6.2, Project Staffing, as well as the requirements in Section 9.5.2.3, Additional Points for Project Staff, which provides opportunities for the bidder to earn additional points for staff experience.

The bidder's response must follow the order of the requirements in Section 5.6, Project Staffing and specifically reference each requirement. Required forms and submittals must be included at the end of Chapter 6.

8.4.9 Chapter 7, Approach to Project Management

This chapter of the bidder's proposal must address the requirements for project management as presented in Section 5.7, Project Management. In preparing its response, the bidders should refer to Section 6.3, Project Management, for contractual project management requirements, as well as Section 9, Proposal Evaluation, which provides areas in which the bidder may earn additional points. The bidder's response must follow the order of the requirements in Section 5.7, Project Management and specifically reference each requirement. The preliminary workplan must be included at the end of Chapter 7.

8.4.10 Chapter 8, Response to Business and Technical Requirements

This chapter of the bidder's proposal must address the requirements for responding to the business and technical requirements as presented in Section 5.8, Response to Business and Technical Requirements.

Bidders may find all business and technical requirements in Section 6, Business and Technical Requirements. The bidder must respond to each requirements set in the same order that they are presented in Section 6, Business and Technical Requirements. Bidders should use the following outline in preparing this chapter:

8.0 Response to Business and Technical Requirements

8.1 Approach to Transition (refer to requirement [B67](#) ~~B66~~ in Section 5.8, Response to Business and Technical Requirements)

8.2 Governing Regulations

8.2.1 Statement of Compliance with Requirements

8.2.2 Understanding of Requirements

8.2.3 Description of How Requirements Will Be Met

8.3 Project Staffing

8.3.1 Statement of Compliance with Staff Management Plan Requirements

8.3.2 Understanding of Requirements

8.3.3 Description of How Requirements Will Be Met

The bidder should then use the same outline for all remaining requirements sets. The state requests that when addressing a specific requirement also cite the requirement by number. The bidder may include diagrams, exhibits, tables, or collateral in its response to requirements.

The state recognizes that there are two areas where the bidder must provide information on project staffing in its technical proposal: Chapter 6, Project Staffing, and Chapter 8.3, Project Staffing. The bidder must provide project staffing information in the following format:

- Chapter 6, Project Staffing – Refer to instructions in Section 8.4.8.
- Chapter 8.3, Project Staffing – Bidder must provide a statement of compliance with Staff Management Plan requirements found in Section 6.2.2 and provide its understanding and approach to delivering such a plan.

In responding to the requirements set for Project Staffing (Chapter 8.3), the bidder must provide a statement of compliance with requirements and provide its understanding of and approach to developing a staff management plan. All other requirements in Section 6.2 of the RFP refer to the mandatory requirements for key positions. The bidder should list its staff and describe their qualifications in Chapter 6, Project Staffing.

8.5 Bidder's Cost Proposal Format

The bidder's cost proposal must contain the bidder's cost data as requested in Section 7, Cost Proposal. The bidder must provide costs for the following:

- Transition
- Ongoing Operations – CPCM:
 - Best Price CPCM

- CPCM with Onshore Call Centers
- CPCM with Call Centers in California
- ATM Cash Withdrawal Fee
- Balance Inquiry Fee
- Labor Rates
- Adding a Language to the Client Website
- Unanticipated Costs for Work Authorizations

The bidder must complete and submit Exhibit 7.1, EBT Costs, with its cost proposal.

8.6 Contract

The bidder's contract volume must contain the contract and completed exhibits as required in Section 5.9, Contract. Failure to adhere to these requirements may result in disqualification.

In addition, the contract may not be modified in any way. The bidder should print the latest contract in the bidders library when submitting its final proposal.

The contract volume must be presented in the following order:

1. Completed and signed copy of the Standard Agreement (refer to Exhibit 5.9, Standard Agreement).
2. Complete copy of the contract including the table of contents.
3. Completed copy of Exhibit D, Equipment.
4. Completed copy of Exhibit E, Certifications.

No other exhibits should be submitted. **Do not submit cost information in any portion of the bidder's contract volume.**

8.7 Bidder's Supporting Documentation

This section specifies the format for a supporting documentation binder. This documentation is not required.

The supporting documentation binder may contain technical and other reference documentation that the bidder chooses to include that supports statements and information provided in its proposal. It may also contain examples or samples of deliverables, documents, or other items that provide insight as to how the bidder might implement its California EBT solution.

If included, the bidder's supporting documentation binder must be presented in the following order:

1. Table of Contents that lists, in the order presented, the items included in the supporting documentation binder.
2. All supporting documentation as provided by the bidder.

Please note that this documentation is not required and will not be evaluated. The bidder should not include material that it considers part of its technical or cost proposal response. Any material that is part of the technical or cost proposal must be included in the appropriate technical or cost binder. In the event the bidder's supporting documentation contains materials that apply conditions or contradict information in the bidder's technical and/or cost response, the technical and cost proposals will be used as the authoritative version.

No cost information shall be included in this documentation (such as commercial product sheets with unit prices, etc.).